2013 Performance Management Program

Quick Reference Guide for Planning Stage

Planning Phase: November 2012- January 18, 2013

All reporting managers should enter objectives onto their forms by **January 18, 2013**.

Logging into ACES Online

1. Click to: https://performancemanager4.successfactors.com/login?company=MA&

2. Enter **Username:** Employee ID & **Password:** Your Password

> Click on the **Forgot Your Password** link on the login page to have a system generated password sent to you by email.

<u>IMPORTANT:</u> Remember to use the "SAVE" button every 10 to 15 minutes as your login session will timeout after 30 minutes.

Reporting Manager Instructions for Entering New Objectives:

1. Click to **My Forms**.
2. Find and click on link to your 2013 form.
3. Navigate to the **Manager Objectives** Section: Enter between two and four Manager Objectives; weights must equal 100%.
4. Click on **Add New Objective** button. New screen opens.

    a. To create your own objectives:
- ❑ Click on **Management Objective**
- ❑ Enter text of objective.
- ❑ Optional milestones may be added with start/due dates and % complete.
- ❑ Enter weight for the objective.
- ❑ Select **Save** icon at the top of the form.

<div align="center">OR</div>

    b. To select an objective from the goal library:
- ❑ Click on **Sample Management Objective**
- ❑ To expand the goal categories, click on the side arrow
- ❑ Click in the check box next to the objective(s) you want to add to your form, and click on **Add Selected Objective**.
- ❑ Optional milestones may be added with start/due dates and % complete.
- ❑ Enter weight for the objective.
- ❑ Select **Save** icon at the top of the form.

Repeat these steps until all objectives have been entered.

6. Navigate to the **Career Growth** section. Add between one and three **Career Growth Objectives** onto your ACES form.
7. Click on **Add New Objective** button. New screen opens.

    a. To create your own objectives:
- ❑ Click on **Management Objective**
- ❑ Enter text of objective.
- ❑ Optional milestones may be added with start/due dates and % complete.
- ❑ Enter weight for the objective.
- ❑ Select **Save** icon at the top of the form.

<div align="center">OR</div>

    b. To select an objective from **Career Growth** goal library:
- ❑ Click on **Sample Management Objective**
- ❑ To expand the goal categories, click on the side arrow
- ❑ Click in the check box next to the objective(s) you want to add to your form, and click on **Add Selected Objective**.
- ❑ Optional milestones may be added with start/due dates and % complete.
- ❑ Enter weight for the objective.
- ❑ Select **Save** icon at the top of the form.

Repeat these steps until all objectives have been entered.

8. **Core Managerial Competencies (Section III)** Read this section to review the competencies all managers will be evaluated on during final review stage.

9. **Confirmation of Objectives being Entered.** Once you have finished entering objectives onto your form, click in check box at the bottom of the form, entitled **Reporting Manager – Confirm Objectives are Completed** to indicate to your appraising manager that the form is ready for his/her review.

10. Click on **Save and Close** icon at bottom of form.

Note: An email will not be generated after clicking on **Confirmation of Objectives being Entered** button. You will need to notify your appraising manager once you have finished entering objectives into your form.

Appraising Manager Instructions:

1. Go to the **My Forms** tab, and locate your reporting manager's form.

   Important Note: If your reporting manager's form is not in your inbox, contact your Agency ACES Coordinator who can work on updating your direct reports in ACES (and the payroll system).

2. **Reporting Manager – Confirm Objectives are Complete.** At the bottom of the ACES form, your reporting manager should have clicked in this check box to indicate that his/her form is ready for your review.

3. **Manager Objectives (Section I)**: Modify the objectives or weights as applicable.

4. **Career Growth Objectives (Section II)**: Add or modify objectives as applicable.

5. **Core Managerial Competencies (Section III)**: Review this section to read the competencies that all managers will be evaluated on during final review stage.

6. **Appraising Manager – Confirm Objectives Reviewed.** Once you have finished reviewing the form and made any updates to the form, go to the bottom of the form, and click in checkbox to indicate to your reporting manager that you have reviewed his/her form.

7. To **save** your edits click on the **save** icon at top of the form.

8. To complete the planning phase, click on **DONE** button at the top or the bottom of the form.

9. A new window will open where you can enter optional comments to include in an email notification to your reporting manager. Click on the **DONE** button to move the form into Progress Review Stage where the form remains until progress reviews begin on **March 4, 2013**. Your reporting manager will receive an email indicating that the planning stage has been completed.

ACES System Features:

□ **High Level Instructions for Each Section.** For each ACES phase detailed instructions have been provided at the top of each form that describe the steps needed to be completed for each stage.

□ **Form Simultaneously in Two Inboxes at Same Time.** The form is simultaneously in the inbox of the reporting manager and the appraising manager for the Planning, Progress Review and Final Review stages. Therefore, only one person can be editing the form at a given time. When the form goes into ACES Coordinator and Signature stages, it routes from one inbox to the next following an iterative process.

□ **Forgot Your Password?** If you forget your password, click to the ACES Login page at https://performancemanager4.successfactors.com/login?company=MA&, and click on **"Forgot Your Password?"** link, enter your Employee ID and click on "Email Me". The system will reset your password to a system-generated password. Upon logging in, you will be required to choose a new password by first entering your system generated password and then entering your new password twice. If you do not receive your login via email, contact your Agency ACES Coordinator.

□ **Did Not Receive Email or is Your Account Locked?** Notify your Agency ACES Coordinator if you do not receive your login information. If you've tried logging on too many times with the wrong password, your account gets locked. Your Agency ACES Coordinator can unlock your account.

For additional help on the Planning Stage, please refer to documents posted on the ACES 2013 Planning Stage Page.